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CHILTON'S
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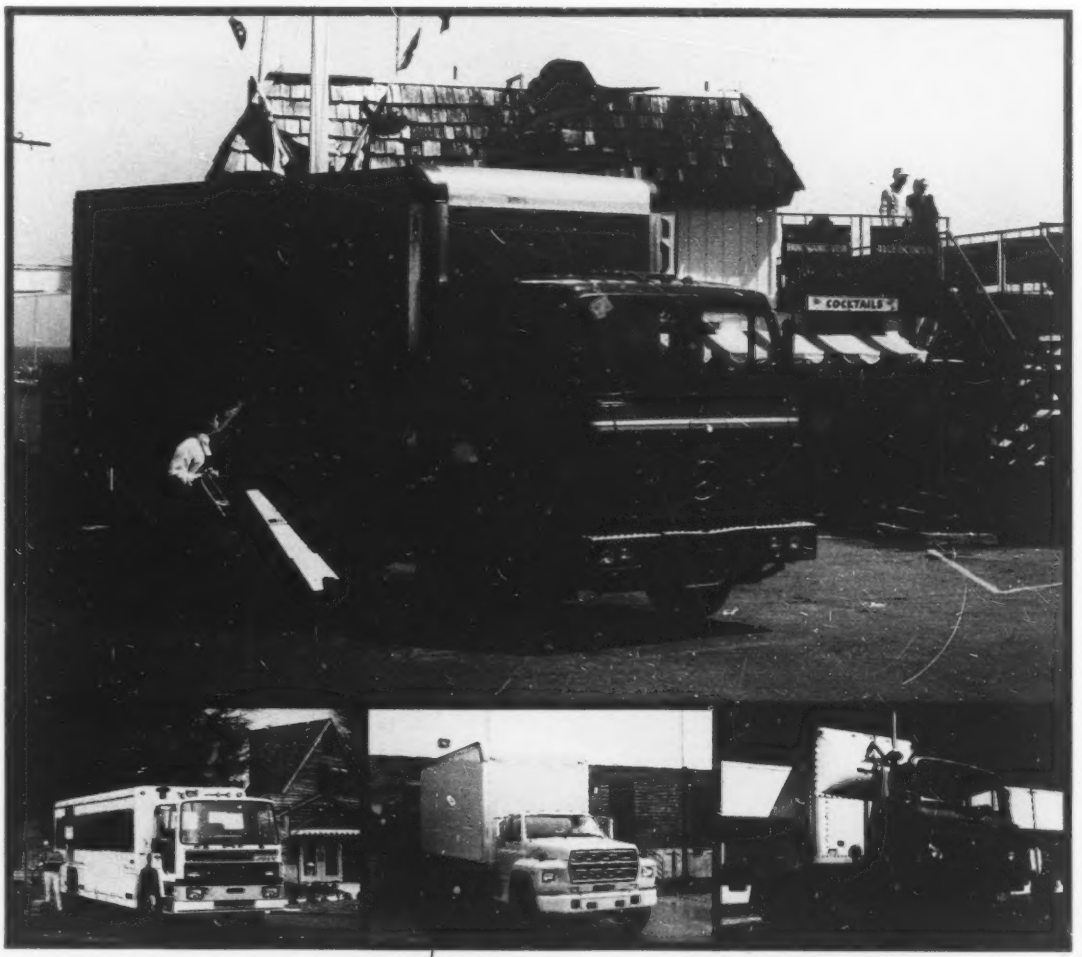
THE TRANSPORTATION & BUSINESS LOGISTICS MAGAZINE JANUARY 1987

MAKE WAY FOR THE 'BABY EIGHTS'!

The new "distribution trucks" are in a class by themselves



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AMES VS. MICROS

OGISTICS ZONE?

VOL. 86, NO. 1

CHILTON'S
DISTRIBUTION

JANUARY 1987

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THE PLEDGE OF ALLEGIANCE

You've no doubt been hearing quite a bit lately about "strategic alliances," the latest in shipper/carrier relationships. Adversarial postures held for years are being disavowed. Cooperation, with an eye on each other's bottom line, is now in vogue. We wanted to find out what shippers had to say about these new partnerships. How do they differ from the traditional shipper/carrier roles? As you'll see, maybe we should have asked, "Do they differ from traditional roles?"...

"There is no difference between 'strategic alliances' and traditional shipper/carrier roles. "Strategic Alliance" may be the second oldest business in the world!"—**David J. Simons, traffic manager, Harmer Simmons, Inc., Seymour, Conn.**

"Strategic alliances require the shipper and carrier to put all their cards on the table. This allows for more consistency between shipper and carrier than do 'traditional' old-fashioned techniques of 'carrier management.' "—**Tony S. Raymond, traffic manager, Baroody Spence Furniture Industries, Orange Park, Fla.**

continued

The strategic alliance concept appears to be something new in transportation procurement:	
agree	37%
disagree	63%
Alliances with a smaller number of carriers is the best way to ensure quality service:	
agree	96%
disagree	4%
Strategic alliances are a more viable concept for companies with large freight bills than for smaller shippers and receivers:	
agree	17%
disagree	83%
The biggest advantage of strategic alliances is:	
predictable service	39%
cost stability	39%
The biggest drawback of strategic alliances is:	
inflexibility to try new vendors and services	51%
lack of exclusivity	19%

QUESTION OF THE MONTH

TROUBLESOME TRADE BARRIERS

There is a growing unrest among U.S. exporters concerning pre-shipment inspections conducted by agents of foreign governments, such as the Swiss-based SGS group. These inspectors frequently demand to see proprietary information related to the products being exported. Agents gather information on the *exact* selling prices, item by item; the exact quantities being shipped; and the exact costs incurred.

Exporters point out that this information allows pre-shipment inspection companies to virtually determine the price at which a company will be allowed to sell its products in a given country. It also can be dangerous if a competitor of the *importer* is able to get hold of this information.

Even if these inspections don't prevent completion of the export transaction, they can be time-consuming and costly.

What has your experience been with pre-shipment inspections? Have they been an albatross for your export program? Have you had to raise the price of your export products because of these inspections? Let us know what you think on the card below.

DIALOGUE January 1987

- How many shipments per month are inspected by SGS?: _____1 to 5; _____5 to 10; _____more than 10.
- Why are shipments most frequently delayed? _____delays in handling paperwork; _____difficulty in securing inspector; _____inspections not carried out within timeframe stated by SGS; _____second inspections
- Have shipments ever been delayed past the expiration of your letter of credit? _____Yes; _____No
  On average, how many times does this happen in a year? _____once; _____one to five times; _____five to 10 times; _____more than 10 times
- How much do you estimate it costs you annually to present your shipments for SGS inspection? _____$0 to $10,000; _____$10,000 to $25,000; _____$25,000 to $50,000; _____more than $50,000
- Do pre-shipment inspections change your terms of sale? _____Yes; _____No.
  If so, how? _____
- Do pre-shipment inspections increase your landed costs, and thus your selling price? _____Yes; _____No

The biggest headache my company experiences because of pre-shipment inspections is:

_____

_____

_____

_____

NAME (print) _____ TITLE _____

COMPANY _____ PHONE _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

FIGURES IN SPEECH

(Quotes from transportation and distribution notables that have caught the ears of *DISTRIBUTION* editors:)

"Pre-shipment inspection companies (PICs) add unnecessary costs, delay legitimate transactions and expose both exporters and importers to the potential for competitive disaster as the data base of proprietary information in the hands of PICs grows.... Such power is unprecedented and even beyond the reach of our own government. That it should be exercised by shadowy for-profit firms is totally unaccceptable."—**Anthony Barone, president, National Export Traffic League, New York, N.Y.**

•

"Protectionist legislation would not improve American productivity, and that is one of the chief causes of our trade deficit. Protectionism winds up protecting those industries which are unproductive and inefficient. Stiff tariffs will ensure just one thing—our trading partners will match us tariff for tariff. It will be televisions versus soy beans, cars versus wheat. It will be war—trade war."—**Thomas H. Kean, governor of New Jersey.**

"I see no difference, only a new coined phrase."—**John M. Thompson, distribution center manager, Master Casualwear Corp., Ripley, Tenn.**

"Strategic alliances bring more volume to fewer carriers, (which results) in more and higher discounts to shippers."—**D. Hoffee, national traffic manager, Challenger Electric, Parkersburg, W. Va.**

"A strategic alliance forces both parties to consider profitability. The shipper must make his freight profitable to the carrier, whether by direct loading, packaging improvement, bar coding, etc. This permits the carrier to price its services accordingly."—**James J. Paule, traffic manager, Spangler Candy Co. Bryan, Ohio.**

"(A strategic alliance) ensures closer cooperation and improved levels of service for the shipper. Plus, it promotes a better understanding of each other's needs."—**Jack Deckert, general traffic manager, W.A. Taylor & Co., Miami, Fla.**

"Carriers are finally listening to the shipper. We want service and commitment!"—**Stephen Fleweiling, traffic manager, WoolRest, N.A., Wilmington, Mass.**

"(Strategic alliance is just) a new name for 'carrier negotiations.' "—**Donald B. Timmerman, chief operating officer, Continental Traffic Service, Memphis, Tenn.**

"(The difference between strategic alliances and traditional shipper/carrier relationships) is only a matter of semantics. Fewer carriers increases your ability to negotiate larger discounts, control freight costs and maintain an acceptable level of service."—**Richard E. Formica, corporate traffic manager, Keuffel & Esser Co., Parsippany, N.J.**

"The written commitment seems more binding than a handshake, particularly if the vendor is new. Everyone knows up front what is expected of them."—**John P. Teschel, traffic manager, Norton Co., Akron, Ohio.**

"(The difference) is just terminology. 'Savvy' shippers have always forged ties with carriers for better service and, since deregulation, for lower cost. Strategic alliances = good business sense!"—**J.H. Jenkins, shipping manager, Excell Home Fashions, Goldsboro, N.C.**

"(Strategic alliances were) the difference between success and failure for Just-in-Time at Unisys Flemington. Strategic alliances established firm ground rules of expected service and price levels."—**Don Longchamps, traffic & logistics manager, Unisys Corp., Flemington, N.J.**

"The difference lies in two words—trust and communication. Trust in each other's ability to perform, and a willingness to communicate."—**Edward Loftus, manager of logistics, Ampex Corp., Opelika, Ala.**

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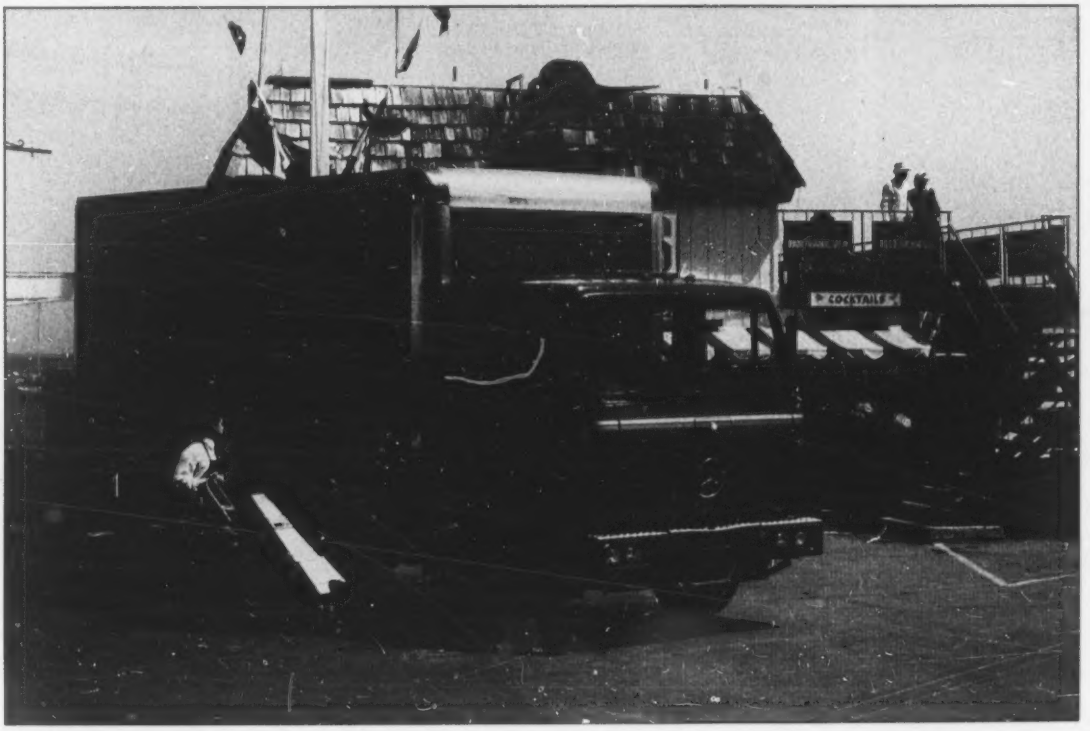
FLEET EQUIPMENT

MAKE WAY FOR THE 'BABY EIGHTS'!



It's hard to get their number, but by any name, the new breed of "distribution trucks" has moved into a class all its own.

A *DISTRIBUTION* Staff Report

If you've ever tried to force your foot into a shoe that was simply too small, you have some idea of how hard it is to comfortably categorize the new type of truck that's helping fleet managers take big strides toward meeting the distribution objectives of the '80s.

The existing truck classification system of the Motor Vehicle Manufacturers Assn. (MVMA) is of little help. It's based strictly on gross vehicle weight (GVW), and GVW only tells part of the story anymore. You also can't get much assistance from traditional truck nomenclature like "single/tandem axle," "low/high profile," or "medium/heavy conventional."

No, to be truly descriptive these days, you really need to zero in on truck *function*. And the function that's now most in demand is multi-purpose, frequent-run, short-haul, inter- and intra-city duty. Many private and for-hire fleets alike are now abandoning big, long-haul rigs in favor of a new breed of smaller, lighter, diesel-powered, more flexible and maneuverable trucks which can meet the new service needs spawned by today's relay-race distribution channels. And the R&D sights of every major domestic truck manufacturer—along with some significant foreign entrants—are now fixed firmly on this trend.

And, while a good chunk of the truck sales that are fulfilling this demand falls into the MVMA's Class 7 slot—thus accounting for a significant shift in MVMA sales figures over the last five years (see table, opposite page)—you'll only start confusing yourself again if you try to find a clean classification, or name, for this type of vehicle. Depending on the weights and configurations that

Contributing Editors Robert Bowman and Kurt Hoffman, Managing Editor Jay Gordon, and Editor-in-Chief Joseph Barks contributed to this report.

meet individual fleet requirements, these trucks can fall into the low end of MVMA's Class 8, or the high end of Class 6, as easily as they can nestle into Class 7. That's why you'll hear them alternately called "Baby Eights," "7½s," or "Super Sixes."

The closest anyone's come to a universally generic description is "distribution vehicle." But even that term should be used sparingly, because it too can understate, or completely misstate, the full utility of truck manufacturing's current—and only—star.

Reinventing the Wheels

The emergence of the new breed, in fact, has sparked interest in trying to make the MVMA classification system more compatible with the times. "Our current classification system is outmoded," says Peter Rupp, president and ceo of Freightliner Corp. "It does not reflect the shifts in the marketplace among truck configurations, nor does it properly reflect usage characteristics."

Ken Penaluna, vice president of purchasing and engineering with Ruan Transportation, goes so far as to claim that "nobody really uses Class 7 and Class 8 anymore. It's an outdated nomenclature, from the 1940s and '50s; it doesn't define the equipment."

Again, though, the problem is that no one really has a better idea as to how the MVMA system could be altered, or replaced.

Should sales reports stop concentrating on weight, and instead look at horsepower, or length, or the number of axles? And even if a new standard of measurement were to be devised, how accurately would *it* be able to pinpoint trends, given the built-in flexibility of just about every new truck that's now being introduced? For example, Larry Miller, president of Ruan's transportation management unit, notes that his company's new "Megamight" truck can now be either a Class 6 or 7, "depending on what kind of delivery service we put it in."

It's also easy to get sidetracked into discussing the external historical factors which have pushed truck manufacturing away from a weight-based emphasis. Some point to the obvious effect of the 1974-75 oil embargo, which spurred demand for fuel-efficient, medium-duty diesels. (Prior to the embargo, Class 6 and 7 trucks were virtually all gas-powered.) Others point to, of all things, the school busing push of the early '70s. That social program promoted development of bus chassis and engine technology (buses fall in the Class 6 weight range) which was then passed on to manufacturers of smaller trucks.

Then there's the impact of federal excise tax (FET) changes in the Surface Transportation Assistance Act (STAA) of 1982. That legislation provided an exemption for two-axle trucks with GVWs of under 33,000 lbs.

"If I've been a three-axle buyer, that's going to make me say, maybe I can get by with a two-axle truck, and not have to pay the FET," notes Terry Young, director of marketing for Volvo White. Indeed, many truck buyers began to specify two-axles with GVWs of 32,900 lbs., paid no FET, and then added the components necessary to handle total loads of as much as 70,000 lbs. Young notes that while Class 7 sales historically have been concentrated around 27,000-28,000 lbs., the average in recent years has moved up into the top end of the class (between 30,000 and 32,000 lbs.)

The STAA also made breakbulk operations a greater reality, Young adds, because of its sweeping allowance of doubles trailers on most of the nation's highways. "Now you want an over-the-road mule to pull the twins into the city," he says, "and a lighter-duty, two-axle tractor, in the neighborhood of 220-250 horsepower, to come in and deliver the freight."

continued

DOMESTIC TRUCK FACTORY SALES BY GROSS VEHICLE WEIGHT

(In thousands of units)

Class (by weight in lbs.)	1986*	1985	1984	1983	1982	1981
Class 6 (19,501-26,000)						
Total Sales	14.39	25.81	29.27	24.31	22.53	50.76
Diesel Sales	NA	14.25	13.79	9.70	8.56	19.34
% Diesel	NA	55.2%	47.1%	39.9%	38.0%	38.1%
Class 7 (26,001-33,000)						
Total Sales	65.79	81.12	74.44	48.89	48.57	41.50
Diesel Sales	NA	50.49	43.41	29.47	26.28	27.65
% Diesel	NA	62.2%	58.3%	60.3%	54.1%	66.6%
Class 8 (33,001 & Over)						
Total Sales	84.57	120.94	138.58	78.57	68.04	94.96
Diesel Sales	NA	120.31	137.69	78.01	67.45	93.77
% Diesel	NA	99.5%	99.4%	99.3%	99.1%	98.7%

**Figures for 1986 indicate sales through the first nine months of the calendar year.*

The gap is fast closing between the MVMA's top two classes, but the numbers don't tell the whole story.

The Fontana Phenomenon

As interesting and important as these factors might be, though, they still take a back seat to the biggest driving force: newfound efficiency and productivity *within* the transportation sector.

"Goods that need hauling are getting fewer, smaller and lighter," notes Freightliner's Peter Rupp. "And those goods are being hauled by trucks which travel shorter distances. The times when operators could put a 450-horsepower engine in their trucks just to be gutsy are over; they've had to recognize the economic forces which impact trucking today."

Dave Wood, marketing manager for Paccar's North American operation, says you only have to visit a place like Fontana, Calif. to understand what's going on.

A few years ago, Fontana—some 50 miles east of Los Angeles, on the edge of sprawling, populous Orange County—basically didn't exist. But now, Wood reports, it's been growing steadily as a haven for truck terminals and warehouses, "as far as the eye can see."

"It's where big rigs come in off the highway and dump their loads," he notes. "Freight consolidators break those loads and put them into straight trucks or 'Baby Eights,' and haul them into town. They're smaller, more maneuverable trucks, they get better mileage, and they're easier to handle in stop-and-go traffic, narrow alleys, or around loading docks."

These are the primary reasons, agrees John Merrifield, heavy truck sales manager for Ford Trucks, why "the market is getting compressed from both the bottom and the top. For years, we have acknowledged that most trucks don't go out fully loaded to the maximum weight," notes Merrifield, "and a lot of companies are deciding they can get by with less power and a smaller truck." But not *too* small; fleet managers still want to be confident they can use an intracity vehicle to haul a fully loaded trailer a couple hundred miles in a pinch.

Special Deliveries

How are the "Baby Eights" actually being worked into existing fleet operations? In addition to the profiles on page 16, here are capsule reports from some other fleet

managers who are making room for the new breed:

Walgreen's—Walgreen Drug Stores has only seven straight trucks in its entire nationwide fleet, but they're used for a very specific purpose: braving the streets of Chicago.

Tom Stedman, director of corporate transportation, calls Chicago "the worst city in the country in which to deliver;" a proliferation of rail tracks and overpasses puts severe constraints on equipment.

For now, Walgreen's doesn't envision making a greater commitment to downsized trucks, because most of its stores are generally accessible to tractor-trailers. But that could change, Stedman reports, "if we ever got to the point of daily deliveries."

Primo's Pizza—The new "distribution trucks" will definitely be at the forefront of this company's ambitious expansion plans. Primo's 2 for 1 Pizza, Inc. currently has one central commissary serving 30 stores in the Atlanta area. This year, the company plans to go nationwide. Another commissary will be opened in Alabama to help serve 70 new stores currently on the drawing board.

Primo's Mel Tringali says the company has a small fleet of Iveco Z-450s—a delivery truck with a GVW of 50,000 lbs. Mel has the same "dilemma" a lot of fleet managers have these days—he doesn't know how to classify these trucks, but he swears by them.

"They've got the height, the width and the capacity to handle our business without bogging down," says Tringali. "They're perfect for in-town delivery."

Blackstone—A distributor of building materials based in East Brunswick, N.J., Blackstone owns 14 single-axle straight trucks made by Hino. Charlie Plungis, maintenance supervisor, says the company has acquired the Hinos two or three at a time to supplement its 65-truck fleet.

Blackstone deploys its Hinos within a 100-mile delivery radius, shipping directly to construction sites. "The cabover handles a lot better than conventional trucks," says Plungis. "Fuel economy is excellent, and dependability is good. We've had very few breakdowns."

With the diesel engine, Blackstone gets between 10 and 14 miles per gallon from its smaller vehicles. Driver comfort is also a major consideration. "After a full day of driving, he doesn't feel like he's been beaten up," reports Plungis. At the same time, Plungis is impressed by the punishment the smaller trucks can absorb. "They seem to stand up to what we can dish out."

Herr Welding Supply—This small company, based in Harrisburg, Pa., has a long history of operating Class 7 trucks. Company President Robert Herr says he's been running vehicles in the 26,000-GVW class for 17 or 18 years. Currently, Herr has six Class 7s, ranging from a 1974 Dodge to two newer Mack Midliners—cabovers with engines built in France by Renault.

The older equipment is ready for retirement, and Herr expects to replace it with more Macks. The company's trucks operate within a 100-mile radius of Harrisburg, carrying high-pressure cylinders, welding machines and industrial gases. The new trucks "seem to fit right in with what we're hauling," Herr reports. "They can take the rough handling that's needed in our industry, without weighing 20 tons."

Some Jobs Are Still Too Big

Be assured, though, that there are still plenty of fleets out there with needs that can't be fulfilled by the "Baby Eights" *et al.* In fact, certain fleet operators are higher than ever on the prospects for big rigs, in view of the increased payloads they can now get with 53-foot trailers and relaxed weight restrictions in many states. These fleet managers aren't rushing to scale down and sacrifice gross vehicle capacity, just to be able to squeeze down an alley or negotiate a busy city street.

One such fleet manager is William G. Bellerose, traffic manager

continued

of Hub Distributing Inc., the Southern California-based transportation arm of the Miller's Outpost chain of clothing stores. Where access to stores is difficult, he says, "we'd rather run a single 28-foot trailer. Straight trucks tend to limit cube availability." Bellerose also feels the new aerodynamically-designed big rigs are "pretty much equal" to the smaller trucks in fuel economy.

What it comes down to, of course, is individual distribution requirements. Brock Partin, vice president-distribution for Proficient Food Co., the Irvine, Calif. firm that services the Denny's restaurant chain and other customers, notes that downsized trucks don't always meet Proficient's needs because of weight considerations. But they're well-suited for the fast food business, he adds. Denny's doesn't use the large amounts of foam and paper fast food chains do, so their trucks weigh out before they cube out.

Some even foresee oversaturation in the "Baby Eight" or "7½" sector. Todd Bloom, vice president of marketing for Iveco, says flatly "there isn't a Class 7 maker in the country who's making money (on that line)." Iveco, despite its success with companies like Primo's Pizza, has targeted production in classes 3 through 6, where it believes the real growth lies; larger trucks are made to special order. "I'm just curious as to where the (downsized) volume is coming from," Bloom says.

Are truck manufacturers truly creating a new market through their latest R&D and marketing efforts? Or is the deck just being reshuffled? Regardless, the good news for shippers is that there's now a much more useful assortment of equipment from which to assemble a customized fleet.

"Inevitably, every dollar spent on a truck is going to get related back to the horsepower that's really needed—versus reserve power and some of the other concepts we've had in the past," says Paccar's Wood. "That means sales of high-end Class 8's will probably shrink a bit more, as people look at trailers that are half-filled. People seem cautious to spend any extra dollars, and this sets the stage for 'Baby Eights.' " ★

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FULFILLING THE NEED FOR FEED, SEED AND EVERY BREED

America loves and needs animals, large and small. So it's no surprise that the "distribution truck" is already hard at work keeping the country's estimated 174 million head of livestock and 232 million household pets healthy and happy.

The Feed & Seed Co. of Jacksonville, Fla. has been committed to downsized trucks for 10 years. Today, its 22 Mercedes-Benz Class 7s comprise the bulk of its fleet.

The service radius of Feed & Seed trucks is surprisingly wide, given the fleet makeup. The company delivers as far north as Virginia, as far south as Key West, and as far west as New Orleans. Yet the heavy-duty build of the Mercedes prevents engine burnout, a common problem with smaller trucks, according to company owner Wendell Davidson.

Feed & Seed recently purchased four more Mercedes Class 7s—two being the company's first cab-over-engine models. Now that the drivers have given rave reviews to the new design, Davidson wishes he'd bought all four as COEs. "I liked the conventionals so well, I was reluctant to change," he says. "I'll probably buy a couple more cabovers."

The Feed & Seed Class 7s get between 9 and 10.5 miles per gallon whether loaded or empty, Davidson reports. That's a big contributor to their overall cost advantage, he says, which comes from good mileage, low maintenance, and dependable operation. The trucks are ideal for multiple deliveries, he adds. Feed & Seed drivers make up to 35 stops a day, many at small pet shops.

Another company that's bullish on the new breed is Kenlin Pet Supply, a wholesaler based in Mahwah, N.J. General Warehouse Manager Joseph Kohn says Kenlin operates a fleet comprised entirely of 15 Volvos with GVWs of 33,000 lbs. The trucks each deliver to between 100 and 150 customers each day, racking up 100,000 miles a year across the Eastern Seaboard as far north as New Hampshire.

About five years ago, Kohn—a former driver for Kenlin—was the first at his company to test the Volvo. He hasn't stopped purring since. "It's a comfortable truck, fuel consumption is unbelievable, it handles up hills fully loaded, the maneuverability is superb—there's nothing bad I could say about this truck," he raves.

—Joe Barks/Bob Bowman

Kenlin is so sold on distribution trucks, its fleet is now pure-bred with nothing but Volvo "Baby Eights."

Feed & Seed's Mercedes are tough enough to overcome small truck owners' biggest pet peeve: engine burnout.